



Cape Town Visitor Trends

January-December 2022

WESGRO

cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

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1. Executive Summary

- Rove Mobile Location Data was used to provide insights that lead to better understanding tourists travel behaviour to Cape Town between January to December 2022.
- The mobile location data insights indicated that 147 319 was the sample sized gathered for domestic and 18 451 was gathered for international tourists who visited the region in the same period.
- Based on the domestic sample, 23 380 tourists were from Johannesburg and 13 821 from Tshwane. Within the international sample, 4 824 were from the United States and 3 902 from the United Kingdom.
- Amongst the domestic tourists, 52.1% were repeat visitors who stayed in the region for 2.8 days, and 63.4% stayed overnight in Cape Town.
- 36.9% of international tourists were repeat visitors, stayed for 3.3 days and 69.5% of the tourists stayed overnight.
- The most preferred arrival day for both domestic and international tourists were Friday and departure days were either Friday or Sunday.
- With regards to the points of interest visited (POIs), domestic tourists indicated that the Victoria & Alfred Waterfront Precinct (2.7 hours) was the most popular attraction, followed by Cape Town restaurants and bars (3.2 hours) and Cape Town International Convention Centre (3.8 hours) which tourists stayed at the longest.
- Similarly, Victoria & Alfred Waterfront Precinct (2.7 hours) was the most popular attraction for international tourists, followed by Cape Town restaurants and bars (3.1 hours) and the Cape Town International Convention Centre (3.9 hours).

2. Methodology and Sample Size

What is mobile location data?

- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymized and does not include any personally identifiable information.

Why use mobile location data insights?

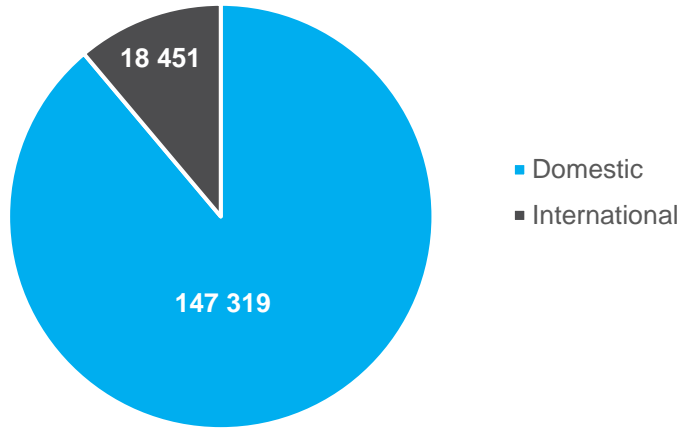
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

The insights in this report represent mobile location data from a sample of **147 319 domestic** and **18 451 international** tourists who visited Cape Town between January – December 2022. Within the domestic data set, 23 380 were from Johannesburg and from the international sampled tourists, 4 824 were from the United States and 3 902 from the United Kingdom.

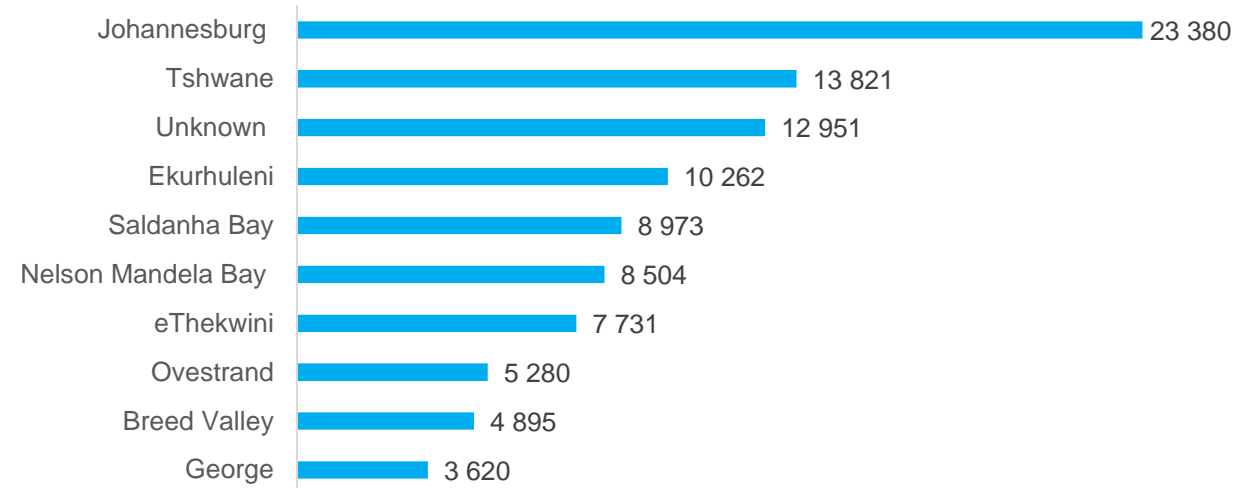
3. Cape Town Visitor Trends & Patterns

3.1 Origin of Tourists to Cape Town

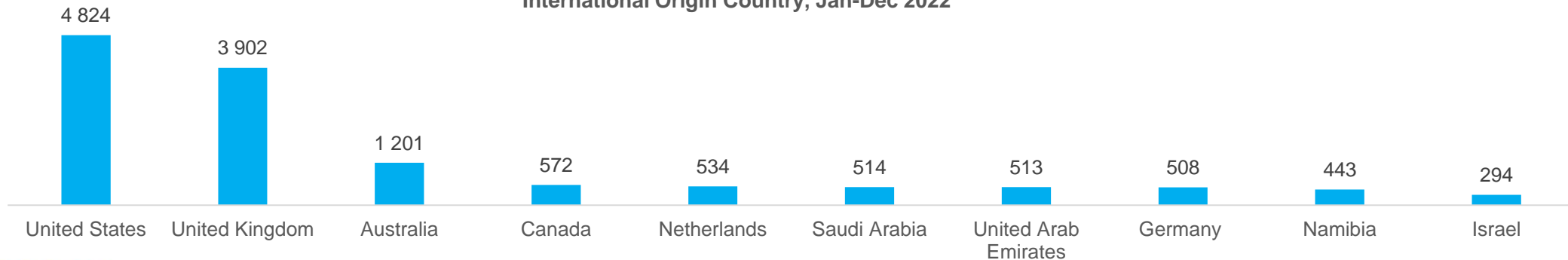
Sample Size, Jan-Dec 2022



Domestic Origin Municipality, Jan-Dec 2022

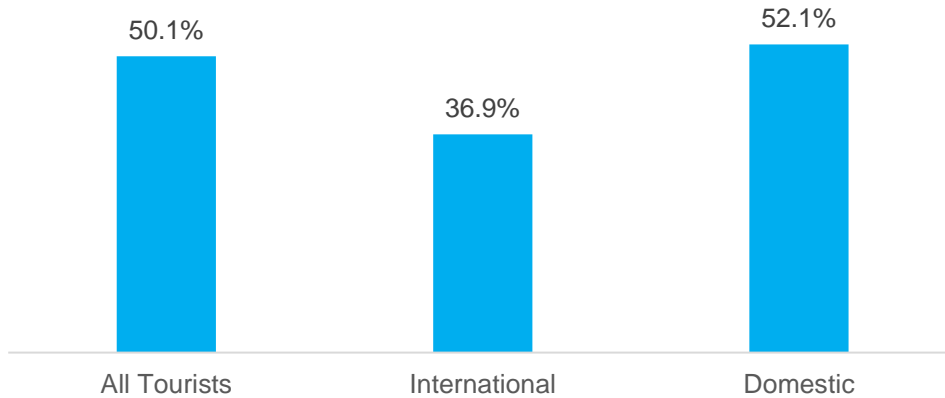


International Origin Country, Jan-Dec 2022



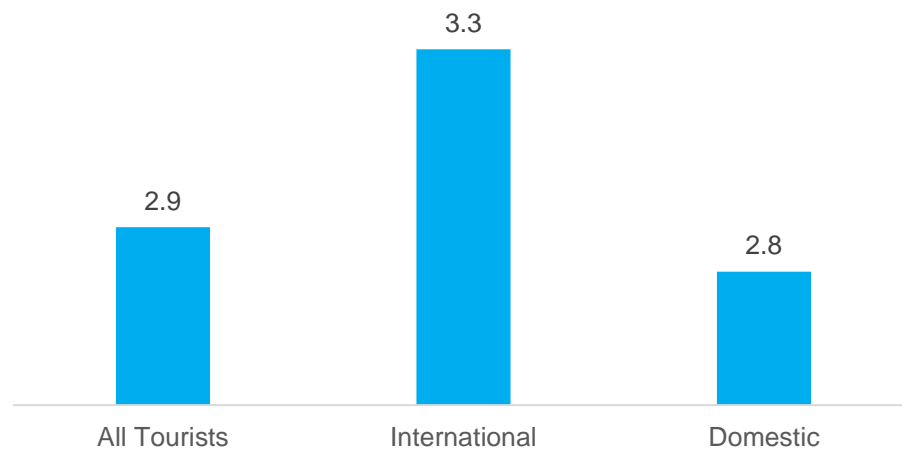
3. Cape Town Visitor Trends & Patterns

3.2 Repeat Visits to Cape Town

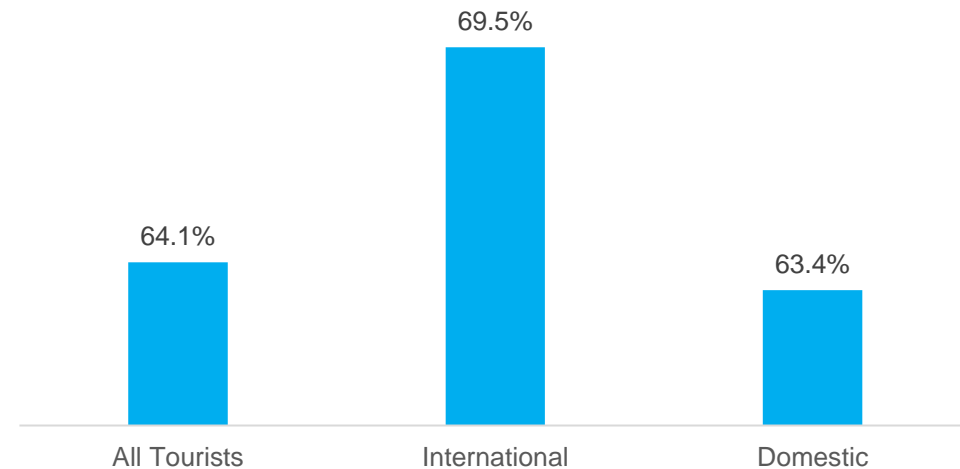


- For the period under review (Jan – Dec 2022), Cape Town saw the most repeat visits from the domestic market (52,1%).
- On average, international tourist stayed for 3.3 days and domestic tourists for 2.8 days in the region.
- Close to 70% of sampled international tourists stayed overnight in Cape Town, while 63.4% accounted for the domestic market.
- Collectively, 50.1% of all tourists (both domestic and international) were repeat visitors, who stayed an average of 2.9 days and 64.1% stayed overnight in Cape Town.

3.3 Average length of stay

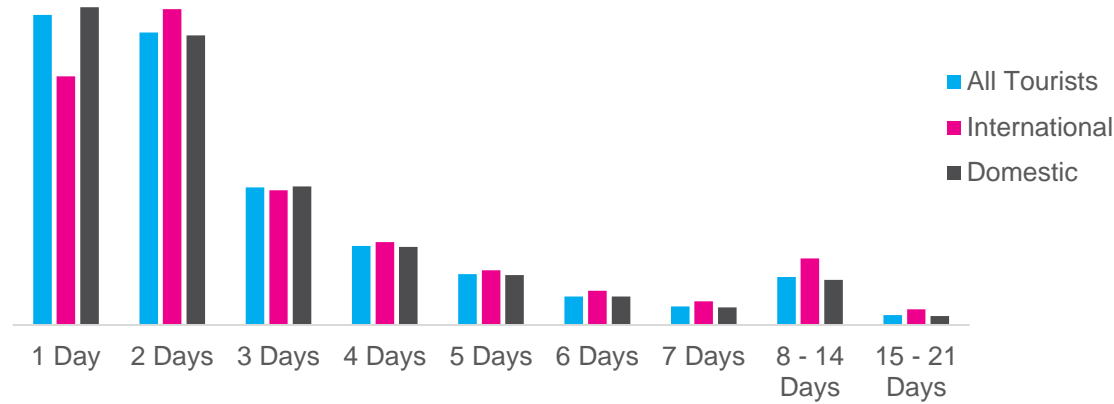


3.4 Overnight Stays



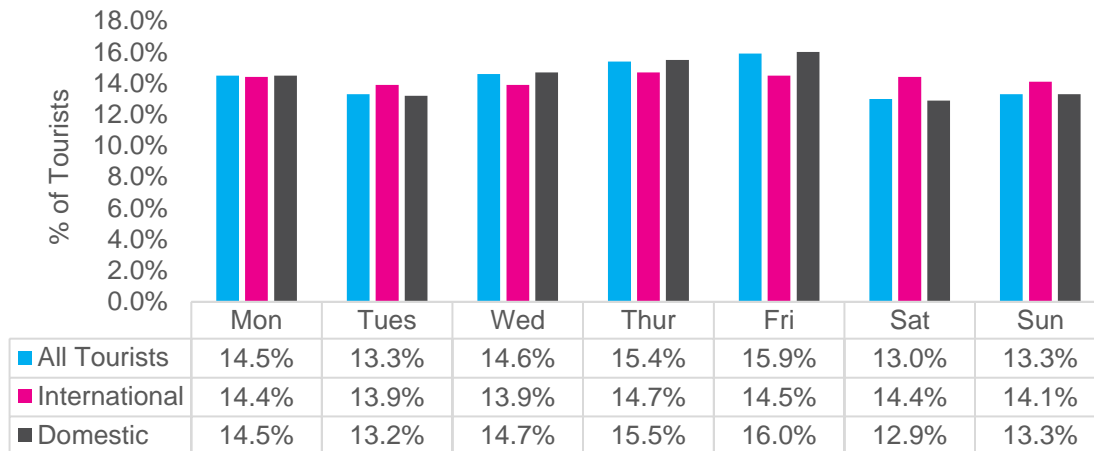
3. Cape Town Visitor Trends & Patterns

3.5 Number of days in Cape Town

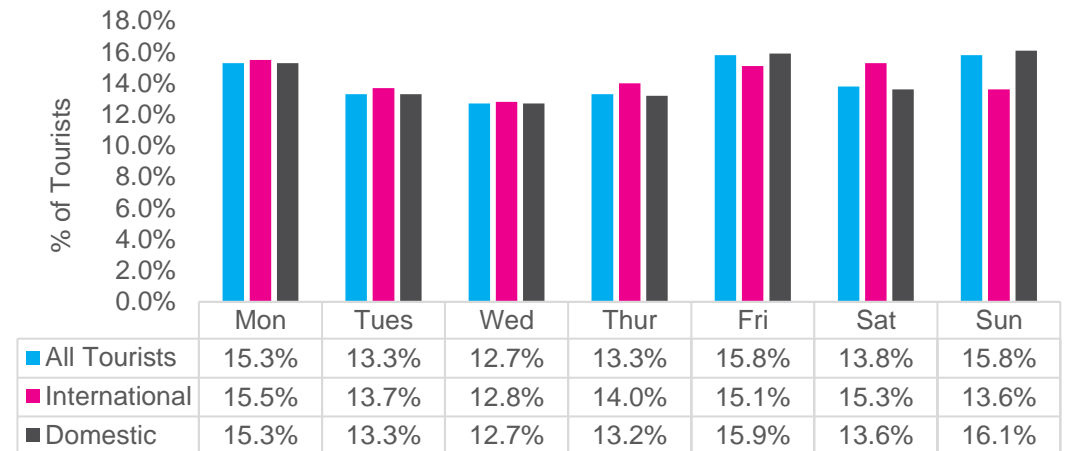


- In comparison, domestic tourists preferred to stay in Cape Town for 1 day, while international tourists stayed for 2 days.
- Domestic tourists to the town were mostly likely to arrive on Friday (16.0%) and depart on Sunday (16.1%), pointing to the popularity in weekends stays.
- In contrast, international tourists most likely arrived a day earlier (Thursday, 14.7%) and depart on a Monday (15.5%).
- In a broader outlook, the most preferred day of arrival for all tourists was Friday and departure days were either Friday or Sunday.

3.6 Popular Arrivals Days in Cape Town



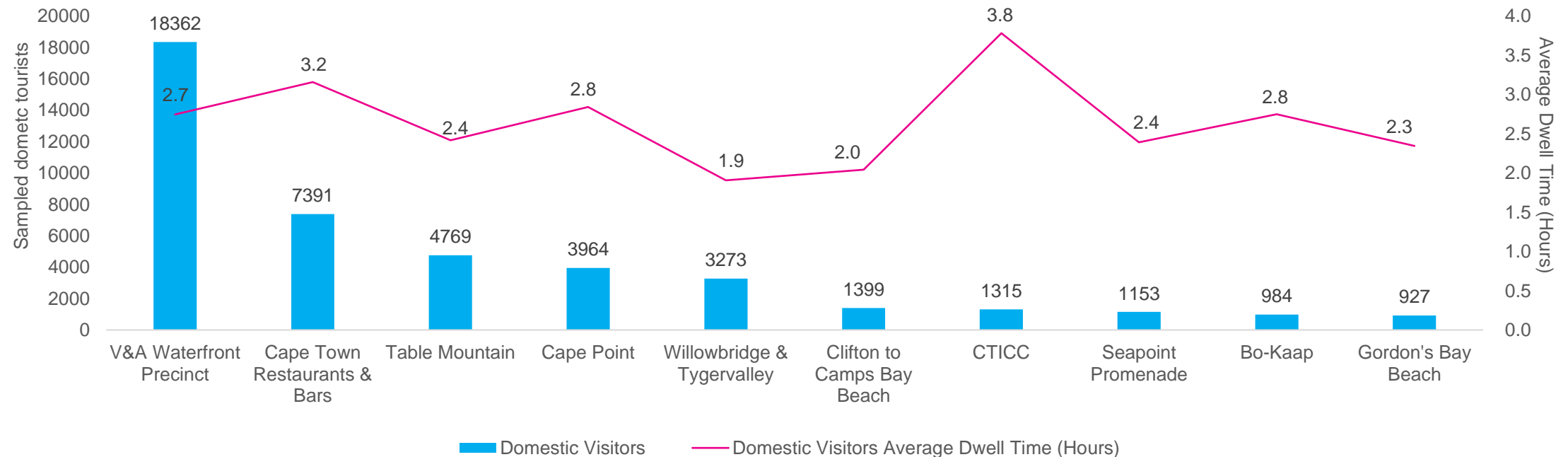
3.7 Popular Departure Days in Cape Town



4. Points of Interest Visited in Cape Town (POIs)

- The Victoria & Alfred Waterfront Precinct ranked as the most popular attraction visited by domestic tourists with an average dwell time of 2.7 hours.
- Cape Town restaurants and bars ranked as the second most popular point of interest amongst domestic tourists with an average dwell time of 3.2 hours.
- Table Mountain and Cape Point were the third and fourth most popular with an average dwell time of between 2.4 and 2.8 hours respectively.
- Domestic tourists spend more time at the Cape Town International Convention Centre with an average dwell time of 3.8 hours. This was likely due to events/festivals and trade shows hosted in Cape Town in 2022.

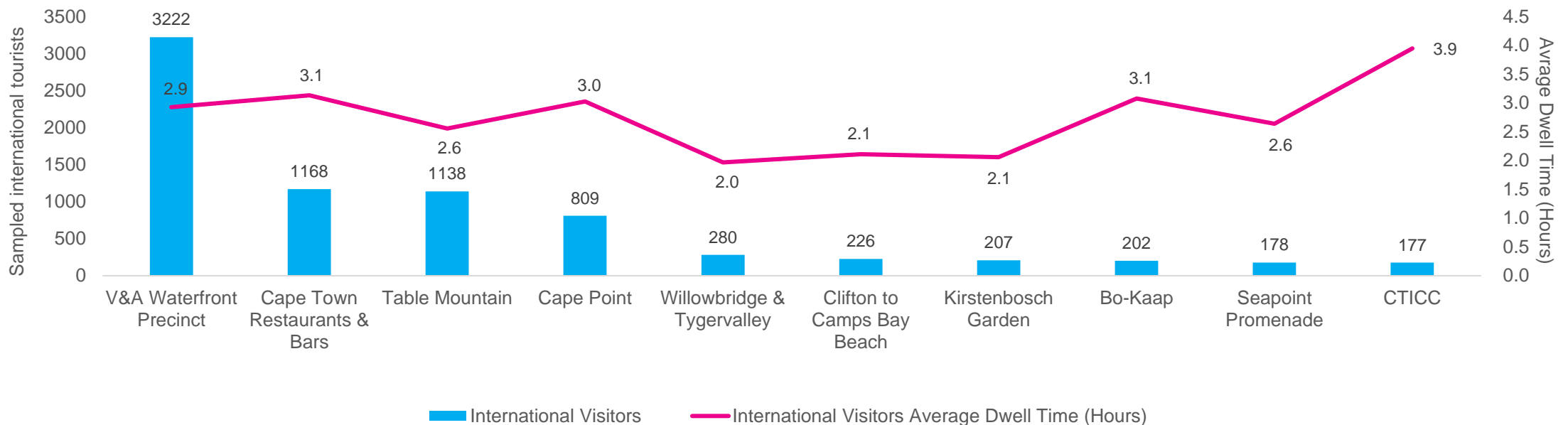
3.8 Domestic Tourists POIs Visited in Cape Town



4. Points of Interest Visited in Cape Town (POIs)

- The Victoria & Alfred Waterfront Precinct was the most popular attraction visited by international tourists and they spend time exploring or shopping on average for 2.7 hours.
- Cape Town restaurants and bars ranked as the second most popular point of interest for international tourists who spent on average 3.1 hours.
- Table Mountain and Cape Point were the third and fourth POIs visited by international tourists with an average dwell time of 2.6 and 3.0 hours spent at each location.
- Amongst the top 10 POIs visited, international tourists spend the longest time at the Cape Town International Convention Centre (3.9 hours).

3.9 International Tourists POIs Visited in Cape Town



Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data
 - Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
 - Data is collected through applications (news, weather, games, texting apps, traffic, etc)
 - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
 - Exception with China which does not share data...
 - Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
 - Should not be compared to visitation data. •
 - Many factors impact total sample size
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors
- Who Are Tourists vs Non-Tourists?
 - A Tourist is typically defined as follows:
 - The visitor does not live or work within the study geography
 - The visitor travels a minimum distance to the study geography
 - The visitor appears in the study geography for a minimum period of time (exclude commuters/passers through etc.)

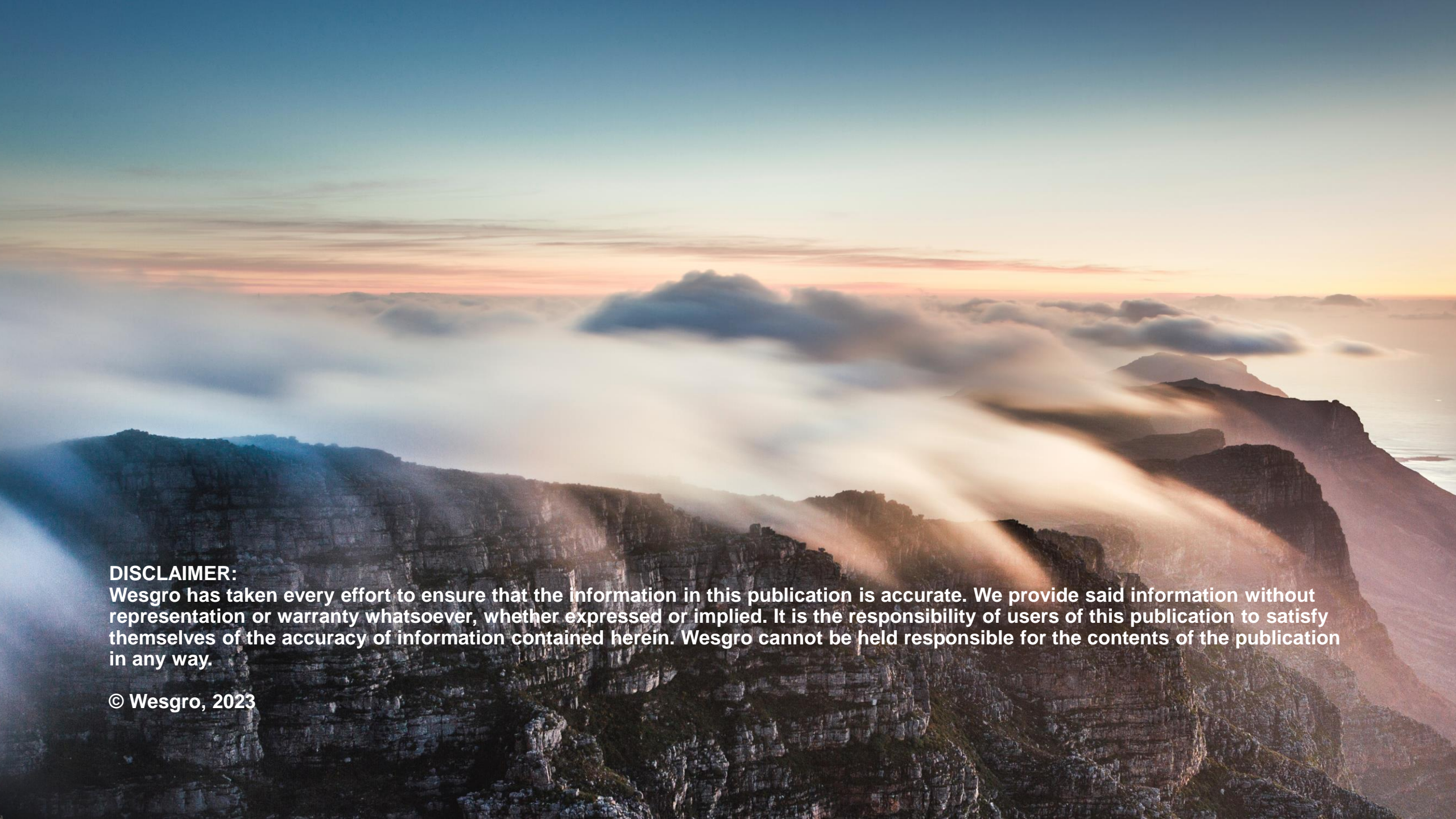
Source: Rove, 2023

Mobile Tourists and Non-Tourists Definitions

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists. Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon. Minimum duration of visit of 120 minutes excludes commuters driving through each region. 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city. Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon. Minimum duration of visit of 45 minutes excludes commuters driving through each city. 		
Point of Interest Study Geography		Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Any 90 day period refers to any consecutive 90 days in their mobile location data history. Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same Region. Domestic Tourists: Tourists who reside in South Africa outside of Western Cape. International Tourists: Tourists who reside outside of South Africa. 		

Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses “visitors” or “tourists” or “residents” or any other grouping of devices, it should always be understood to be a sampling of real world visitor ship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device’s home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday Friday, 8am 6pm local time] time]. While most often associated with a device’s office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay at home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising of devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising of devices which are determined to have NOT have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of the geography.



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